


LEAD 2013 – 2014

New LEAD Coordinator Training




This presentation will cover:

- LEAD – what it is and why we do it
- LEAD Terminology
- The EPSB LEAD web application
- An overview of the LEAD steps and the LEAD timeline
- Reading LEAD reports and resolving LEAD issues



LEAD – the what and why

- LEAD stands for
 - Local
 - Educator
 - Assignment
 - Data
- Authorized by KRS 161.1221 and 16 KAR 1:050



LEAD – the what and why

- Ensures a properly certified educator in every position.
- Looks at all courses and compares staff and course information to the teacher certification database.
- Ramifications for assignments not in compliance can be loss of SEEK funds or legal action against administrator and/or teacher certificates.



LEAD – the what and why

- LEAD data is also used for:
 - Highly Qualified (HQ) teacher reporting
 - Other state/federal reports as needed
 - Data research by EPSSB, KDE, and LRC
 - Open Records Requests
 - Course data will be used for Teacher of Record/Professional Growth and Evaluation System information (TOR/PGES)
- Data Quality is of vital importance.



Terminology



Basic Terminology

- **Extract**
 - The process in Infinite Campus for generating a LEAD file to upload to the EPSB website
- **Preliminary Audit Report**
 - The primary tool for working through LEAD data. This report should be generated by the coordinator after every upload. It will display only those individuals with unresolved LEAD issues.
- **Run Report**
 - Generating the PDF of the Preliminary Audit Report. This does not indicate a new upload is necessary.
- **Staff Warning**
 - Comments appearing in red (other than "certification issue") on the school page of the preliminary audit report. These warnings must be corrected on the preliminary audit report but can be disregarded on the full data report.
- **Submit or Finalize**
 - Finishing the LEAD report by using the sign off feature. Submitting indicates that work on the LEAD report is complete and all errors are either clear or are understood to be true certification issues. Once submitted/finalized, a district cannot access the LEAD data for further editing.
- **Upload**
 - Sending the LEAD file to EPSB via the LEAD website once the file has been generated during the extract process in Infinite Campus



Tips



Helpful Hints

- The LEAD process is a team approach.
- Involve HR staff, curriculum specialists, special ed coordinators, guidance counselors, finance officers
 - Provide training to staff as needed (counselors, principals, attendance staff, and curriculum specialists)
 - TIP: Train staff to use the "Staff Locator" in IC when adding new staffmembers
- Create a consistent method for communicating information from the school to the district level during LEAD reporting



Helpful Hints

- Upload your report early and as frequently as needed
 - Early upload allows staff assignment changes to happen early
 - As paperwork is processed at EPSB, corrections happen automatically
- Uploading to our site allows you to view any certification or coding errors AND allows us to see that information so we can help you. Your report is not officially “submitted” until you sign off.
- **Do not wait to hear from EPSB after an upload. We do not notify you concerning errors during the uploading phase.**



Related Topics

- Integrated Science 2-4
 - Districts will need to submit the electronic approval request form if planning to offer state course numbers 303092, 303093, 303099, or 303010.
 - These will automatically clear once the approval has been granted.
 - Email EPSBLEADTEAM@KY.gov to request form
- KECI (Kentucky Educator Certification Inquiry)
 - Principals and district personnel can use the permissions tool in KECI to find out exactly what an individual can teach. If you have questions, please contact the LEAD Help Desk.
- MUNIS
 - MUNIS errors related to job class corrections will be corrected by re-submitting the district PSD/CSD file to KDE (usually done by your finance officer)



The Online EPSB LEAD Web Application



Access

- Log in from the www.epsb.ky.gov homepage then select LEAD from your EPSB Online Services menu OR
- Web address to directly access the online EPSB LEAD site is <https://wd.kyepsb.net/EPSB.WebApps/LEAD>
- Login using your user ID and password
- Contact Cindy Godsey or the EPSB help desk if you have problems logging in



Navigating the Site


Navigating the Site

1. Link to Kentucky Educator Certification Inquiry (KECI) to check certificate type, status, and permissions
2. Returns to the main LEAD page
3. Page to upload file once it has been exported from the SIS
4. Online LEAD editor – use for final corrections once SIS corrections are complete
5. View Preliminary Audit Report, Full Data Report for district and specific schools; e-mail reports to building level principals
6. Use your user ID and password to digitally signoff and submit your report by November 1



Timeline


Important Dates



Important Dates


FALL	
September 3	EPSB LEAD reporting system activated
November 1	Deadline to digitally sign-off on your report to fully submit it
Spring	
January 15	EPSB LEAD reporting system activated
February 28	Deadline to digitally sign-off on your report to fully submit it
March 1 - 31	HQ report tool will be available

NOTE: Principals will NOT be able to access the HQ Reporting Tool via EPSB website until the district LEAD coordinator has signed off on the LEAD report



The LEAD Steps

All steps are in the “Quick Reference – LEAD Process Steps” document



The LEAD Steps

- STEP 1 – Create the LEAD extract file in Infinite Campus
- STEP 2 – Upload the file to the EPSB website
- STEP 3 – Open and review the report
- STEP 4 – Correct issues

Steps 1-4 will be repeated multiple times

- STEP 5 – Submit the report



Creating the extract file

Step 1



Selections on the extract page in IC

Steps 1.1-1.6

1. Date Range
 - For the fall report: start of school to the last day of school in December
 - For the spring report: start of school to the last day of school
2. Reporting Period
 - Choose the appropriate report (fall or spring)
3. Format
 - For upload to EPSB website the XML format **must** be selected
 - For review purposes you can generate as CSV or HTML format
 - This is a good way to check for duplicate staff members
4. Calendars
 - Use CTRL+click or SHIFT+click to select more than one calendar
 - For the final LEAD extract, **all schools** must be included
 - For review purposes, you can upload one school/calendar at a time



IC Path:
KY State Reporting>LEAD Extract



Extract Summary

Step 1.7

John Doe's Extract Summary

There are errors and/or warnings in the extract (See below). [Click Here](#) to generate the final extract.

Error: The following records are missing SSN, EMP TYPE, or both and will NOT be included in the final report. (Number of Records: 215)

DTG	VERSION	DISTRICTNUMBER	DISTRICTNAME	ACAD_YR_ENDING	SEQUENCENUMBER	SSN	SCRCODE	CNUM
08-08-2010	15-11-27	0.1007.2	KDE County	10	1		071	101_1
08-08-2010	15-11-27	0.1007.2	KDE County	10	1		071	101_2
08-08-2010	15-11-27	0.1007.2	KDE County	10	1		071	101_12
08-08-2010	15-11-27	0.1007.2	KDE County	10	1		071	101_3
08-08-2010	15-11-27	0.1007.2	KDE County	10	1		071	102_1

- If an error report is generated, review the errors
- These are errors that will NOT be included in your extract file
 - They are not your LEAD errors, they are data issues
- Continue with the extract process even if errors are not clear the first time
 - All errors will need to be cleared before the final upload)



Extract Summary - errors

- Error: “The following records do not have SSN, EMP TYPE or Both and will NOT be included in the final report”
 - Selection Criteria (From IC):
 - Primary or Secondary teachers without a social security number, Employee Type, or both are included in the error report. These teachers, and any courses for which they are assigned as the Primary teacher, will NOT be included on the final extract.
 - Other than SSN, the staff members included in this report otherwise meet the criteria for the LEAD extract staff component.
 - How to correct:
 - Check the demographics tab and the identities tab to make sure the SSN's are both there and both match; check all identities
 - Retype SSN on demographics tab and resave
 - Check census list for duplicate entries for the staff member



Extract Summary - errors

- Error: “Warning: The following staffs have duplicate SSNs. (Number of Records:##)”
 - Selection Criteria (From IC):
 - Staff members who appear in the staff component of the LEAD file and who share a social security number with another staff member on the list.
 - Other than SSN, the staff members included in this report otherwise meet the criteria for the LEAD extract.
 - How to Correct:
 - Check census list for duplicate entries for the staff member
 - Ensure each staffmember has a distinct SSN



Extract Summary - errors

- **Error: "Warning: The following EMP TYPE 01 staff are NOT assigned to a course section"**
 - Selection Criteria (From IC):
 - Includes a list of staff with EMP TYPE (employee type) = 01: Teachers who are not assigned to a course section as a Primary Teacher, Secondary Teacher or Section Staff in the Staff History tab at any time during time period defined in the extract editor.
 - 01= Teacher
 - Staff member must have a District Assignment that overlaps the time period defined in the extract editor to be considered for this warning.
 - How to Correct:
 - All teachers must have courses or should be assigned as an additional teacher
 - Gifted, homebound, special ed teachers must have courses or be assigned as an additional teacher
 - Curriculum coaches and others that work ONLY with teachers should not have an employee type of 01-Teacher
 - Do NOT change the employee type to make the error clear if the individual is a teacher



Extract Summary - errors

- **Error: "Warning: The Core ID and ALTCNUM are both blank"**
 - Selection Criteria (From IC):
 - Includes a list of course names and section numbers where both the Core ID (core content indicator) and ALTCNUM (state code) are null.
 - ALTCNUM = state course code (course tab)
 - CORE_ID = core content (section tab)
 - How to correct:
 - Assign a state course number
 - If the state course code is 909999 must also assign content
 - Check the KDE website for the Kentucky Valid Course List to verify numbers



Extract Summary - errors

- **Error: "Warning: The most recent Primary Teacher for the listed sections has a staff history record end dated prior to the last day of the section. These sections will still report on LEAD. Most recent Primary Teacher is listed below with each applicable course."**
 - Selection Criteria (From IC):
 - Includes a list of course names and section numbers where the Primary Teacher's staff history record has been end dated prior to the last day of the section.
 - Section must have had at least one Primary Teacher assigned at some point during the course to pull on this warning. Sections with no teachers assigned at any time during the section will not pull on this warning.
 - How to Correct:
 - Ensure the current teacher for the course is listed as the Primary Teacher
 - The Primary Teacher cannot be left blank if the position is being filled by a substitute



Extract Summary - errors

- **Error: “Warning: The sections listed below have never had a Primary Teacher assigned. These sections will not report on LEAD.”**

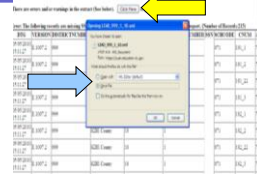
- Selection Criteria (From IC):
 - Includes a list of course names and section numbers where no record exists on the Staff History tab for a Primary Teacher at any time during the section.
- How to Correct:
 - Ensure the teacher for the course is listed as the Primary Teacher
 - The certified teacher serving as facilitator for courses offered through digital learning providers must be listed as the Primary Teacher



Saving the file

Steps 1.8-1.10

- Select “Click Here” to proceed
- When it gives you the option to open or save, choose “save”
 - If the file already exists, cancel the save, go to your desktop to rename the old file and the old zip file, and then click the “Click Here” again
 - If you see an error that states “Infinite Campus cannot download Prism” try using Mozilla Firefox instead of Internet Explorer.
- Save the file to your desktop (in a LEAD folder if possible)
- Go to the file location to zip the file
 - Right click on the file name
 - Select “Send to” and “Compressed Folder”



Verify the file name as you save
Should be **LEAD_123_1_14.xml**
(.xml may be hidden)
123 = district number
1 = reporting period
2 is for spring, 1 is for fall
14 = school year



Upload the file Review Reports

Steps 2 and 3



Upload Report

Step 2: Step 3.1

After successful upload (and confirmation), go to the Reports page

The EPSB LEAD system will warn you if the file name is not correct. It must be a zipped .xml file.

If you see the big red stop sign, e-mail EPSBLEADTEAM@ky.gov with your name, the district name, and the time of your error

EPSB Site Steps

- Step 3 – Open and review the report
 - Always open preliminary audit report immediately after successful upload
 - Use the “comments” to determine how to correct errors
 - After the first upload, have the schools review the staff list on the full data report for inaccuracies

Open and Review Reports


Step 3.2

Organization	Preliminary	Final	Email
Danville Independent			<input type="checkbox"/> Robert S Rowland (School District Superintendent) (mhr.patnak@ky.gov) <input type="checkbox"/> Gregory Schultz (Dir of District Personnel) (mhr.patnak@ky.gov) <input type="checkbox"/> Gregory Schultz (LEAD Coordinator) (mhr.patnak@ky.gov)
Danville State Middle School			<input type="checkbox"/> Michael Godbey (School Principal) (mhr.patnak@ky.gov)
Danville High School			<input type="checkbox"/> Joseph Owen Payne (School Principal) (mhr.patnak@ky.gov)
Hoggett Elementary School			<input type="checkbox"/> Rebecca Goode (School Principal) (mhr.patnak@ky.gov)
Jessie Rogers Elementary School			<input type="checkbox"/> Danielle Dempster (School Principal) (mhr.patnak@ky.gov)
Talver Elementary School			<input type="checkbox"/> Judith Spellacy (School Principal) (mhr.patnak@ky.gov)
Woodburn Children's Alternative Campus			

- Choose appropriate report icon to view – usually Preliminary
 - District-wide information is listed first
 - School-specific reports are available next to the school's name
 - You can open a report at any time without re-uploading

Correcting Issues


Editing
Step 4



Correcting Issues


Steps 4.1-4.2

- Most corrections should be made in Infinite Campus
- You must regenerate the extract and re-upload for any corrections made in IC to appear (Steps 1-3)
- **DO NOT move on to the online edit LEAD data page until most corrections have been made using Infinite Campus**
- We recommend you set a date (around October 21/February 21) after which you will only use the online edit LEAD data page
 - Do not use the online edit page until **all** staff warnings (incorrect SSN/no courses) have been corrected



IMPORTANT!!

- Any changes you make using the online Edit LEAD Data page will be lost if you upload a new version of the export file
- Do not use the online Edit LEAD Data page until SSN and “No Courses” warnings have been resolved



Online LEAD Editor

Main Edit Screen Step 4.3

1. To access this page, click "Edit LEAD Data"
2. To review an entire school, click the edit link
3. To edit an individual, click the [arrow](#) to expand the school and then click the "View Details" link

EFOS
Educational
Feedback
System

Online LEAD Editor

Individual Edit Screen

- Use tabs show and edit information
 - Roles – can be added here
 - MUNIS data when loaded
 - Course data (edit here)
 - Permissions for this teacher
 - Reassign all courses

EFOS
Educational
Feedback
System

Online LEAD Editor

Individual Edit Screen: course data tab Step 4.3

1. Click "Edit" for courses showing errors in status column
2. Delete multiple courses if necessary
3. Add an additional teacher to courses (check mark courses and enter additional teacher's SSN)

EFOS
Educational
Feedback
System

Online LEAD Editor

Course edit box Step 4.3

- Make corrections (cannot edit KDE# or ID)
- Make course related comments here (i.e. repeating students)
- Click Update

NOTE:
Error will still
show in
"Status" until
report is run



Online LEAD Editor

MUNIS Data tab Step 4.3

- MUNIS errors will not appear on the "Edit LEAD data list"
 - Click "Edit" by school and then find the name in the drop down
- Click "Edit" to add comments regarding MUNIS errors



Editing online

Step 4.3

- Once all corrections are made
 - Select "Reports" from the top bar
 - **DO NOT UPLOAD A NEW FILE**
 - Click the PDF icon beside the district name in the "Preliminary" column to view the updated report
- Don't forget to make the changes later in your SIS




Submit and Sign Off

Step 5



Finalizing

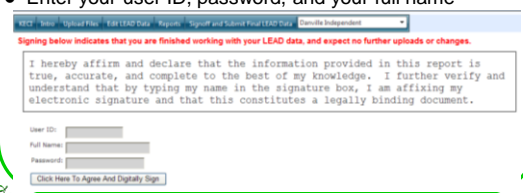
- Step 5 – Submit the report
 - Prior to sign off, have each school principal verify the full report for their school. Things they should look for include:
 - Teachers on the 1st page showing with no courses
 - Teachers with incorrect or missing schedules or content
 - Teachers missing from the report completely.
 - NOTE: collaborating special education teachers will not have an individual listing but should appear in the teacher list.
 - HQ status for each course once it has been entered at the school
 - Sign off indicates you are done working with the report and all data is accurate
 - No changes at the local level after sign off
 - Errors still on the report as of Nov. 1 will be reported to KDE
- The deadlines to sign off on your report are:**
 - Fall - November 1st**
 - Spring – February 28th**




Sign Off

Step 5

- When all corrections have been made, view your preliminary audit report one final time before sign off
- Select “Signoff and submit Final LEAD Data” from the top bar
- Enter your user ID, password, and your full name





Reports

Preliminary Audit Report
Full Data Report
E-mailing reports



Reports

- Preliminary Audit Report
 - **Run after every upload**
 - Use to investigate errors
- Full Data Report
 - Run by mid October (fall) and by mid February (spring)
 - Use the e-mail tool to distribute portions to the appropriate school personnel for verification
 - Save a copy on disk or hard drive for a record of all data submitted



Reports

- Verify date of most recent export on page 3 (either report)
 - P. 3, item A
- If corrections are not reflected after a new upload, check this date.

Any Town County

File Summary

Year: 2017-2018 Spring
File: AnyTownCountySummary.pdf
File Size: 10.1 KB
218 staff members
1402 courses
1402 certification issues


File Exported At: 26-FEB-08

Course	School Code	Grade Range	Comments
Any Town County	N/A	N/A	0 certification issues; 0 MAND certification issues;
North Town Primary School	010	Early - Primary	90 courses; 70 staff members; 0 certification issues; 0 MAND certification issues;
Any Town High School	040	6th - 12th	100 courses; 10 staff members; 0 certification issues; 0 MAND certification issues;
Any Town Middle School	050	6th - 8th	400 courses; 10 staff members; 0 certification issues; 0 MAND certification issues;
Central Wisconsin Center	014	Preschool - Postsecondary	0 courses; 0 staff members; 0 certification issues; 0 MAND certification issues;
South Town Elementary School	030	Primary - 5th	100 courses; 10 staff members; 0 certification issues; 0 MAND certification issues;
Any Town Day Treatment Ctr	012	6th - 12th	100 courses; 17 staff members; 0 certification issues; 0 MAND certification issues;



Reports

- Full Data Report
- E-mailing Reports
- Staff List Review



EPSS
Education Professional
Support Service

-
-
-
-
-
-

Full Data Report

- File Summary – same as Preliminary Audit Report
- Specific School information
 - List of ALL staff members from SIS
 - Includes certification, MUNIS, and assignment information on ALL teaching staff
 - Will show all courses (examples p. 10-12)


NAME: DUNN, JACQUELINE W SSN: 144707012 RSN: 012014060 CDSID: Any Town County SCHOOL: NORTH TOWN PRIMARY SCHOOL

FILE	DESCRIPTION	DATE	TIME	FILE	DESCRIPTION	DATE	TIME
ALL	Professional Certificate for Teaching in Elementary School, Primary Through Grade 6	01/04/2003	08:00:00	ALL	Self-Monitoring (S)	01/04/2003	08:00:00
ALL	Professional Certificate for Teaching in Elementary School, Primary Through Grade 6	01/04/2003	08:00:00	ALL	Continuing Education (CE)	01/04/2003	08:00:00
ALL	Statement of Eligibility for Professional Certificate for Teaching in Elementary School, Primary Through Grade 6	01/01/2003	08:00:00	ALL	History (H)	01/01/2003	08:00:00
ALL	Statement of Eligibility for Professional Certificate for Teaching in Elementary School, Primary Through Grade 6	01/01/2003	08:00:00	ALL	History (H)	01/01/2003	08:00:00

File Name File Size Media Info Process Description Comments

allstaff 10402000 10 2003 01/04/03 01/04/03 08:00:00 08:00:00

Number	Description	Category	Type	Age	LOC	Comments
10000001	UNIV. ARTS	English Language Arts	General	1st	NA	Checked
10000002	UNIV. ARTS	Language Arts	General	1st	NA	Checked
10000003	UNIV. ARTS	Mathematics	General	1st	NA	Checked
10000004	SOCIAL STUDIES	Social Studies	General	1st	NA	Checked
10000005	SCIENCE	Integrated Science 1	General	1st	NA	Checked
10000006	TECHNOLOGY	Computer and Technology Applications	General	1st	NA	Checked




EFOS
Education International
Research & Review

-
-
-
-
-
-

Full Data Report

- Use to verify staff lists after first upload each semester
- Download in mid October (FALL) and mid-February (SPRING)
- Distribute to schools for verification of the information (use LEAD application e-mail tool)
- Make sure all principals have reviewed the information prior to HQ in March
 - Any needed corrections will be made by the school/district by unlocking your Spring report
 - Will result in all schools having to start over with HQ report



EPFS
Education Performance
Standards Board

-
-
-
-
-
-

E-mailing reports


- Check name of report recipient
 - If incorrect person is showing, update role in KEC!
 - Individual must log in to update incorrect or missing e-mail addresses
- Type in message – be specific about which report you want the individual to view
- Click “Send Message” – this will send a link to this report page for their school only

-
- | Organization | Preliminary / Final | Final |
|---|---------------------|--|
| Devolve State Middle School | Preliminary | Review E Extended School Status (Extended) (info path@qy gen) |
| Devolve State High School | Preliminary | Review State High School (Extended) (info path@qy gen) |
| Devolve High School | Preliminary | Review State High School (Extended) (info path@qy gen) |
| Hesselt Elementary School | Preliminary | Review Hesselt Elementary School (Extended) (info path@qy gen) |
| Saint Joseph's Elementary School | Final | Review Saint Joseph's Elementary School (Extended) (info path@qy gen) |
| Tanner Elementary School | Final | Review Tanner Elementary School (Extended) (info path@qy gen) |
| Woodbury Children's Rehabilitation Campus | Preliminary | Review Woodbury Children's Rehabilitation Campus (Extended) (info path@qy gen) |
- Print Back
- Please review your full report by clicking on the link provided. Check for missing content, correct assignments, and incorrect content, population, and grade range.
Cindy Godsey -- LEAD Coord.



Teacher List Review

- Use the e-mail tool to send each school's full report early each reporting period
- Have school level staff (or district where appropriate) review the staff list and compare EPSB Name to SIS Name
 - If they are different individuals, correct the SSN at the school level
 - If someone's name has changed (marriage etc), they can contact EPSB to have the name changed in our database or change it by logging into their account
 - Make sure all teaching staff are listed in both the SIS and the EPSB columns



- 


[illegible]

- Compare **EPSB Name** to **SIS Name**
 - Examples A and B
- Look for teachers **without SIS data**
 - Examples C and D




Reports

Preliminary Audit Report
Resolving LEAD issues using the report

The logo for the Educational Financial Services Board (EFSS) is located in the bottom left corner. It features a stylized green apple icon with a leaf, followed by the text "EFSS" in a bold, sans-serif font, and "Educational Financial Services Board" in a smaller font below it.

Preliminary Audit Report

- This report shows summary information and staff members that have “kicked out” as a result of one or more certification/coding errors.
- Remember that “kickouts” need to be resolved at the district level by the November 1 sign-off, or they will likely show on the EPSB report to KDE’s commissioner in mid November.



EPSB
Education Performance
Standards Board

-
-
-
-
-
-

[illegible]

-
-
-
-
-
-

School	School Code	Grades	Comments
Any Town County	999	00	0 certification issues, 0 HANS certification issues
North Town Primary School	010	001 - Primary	36 courses, 76 certification issues, 0 certification issues, 0 HANS certification issues
Any Town High School	240	001 - HS	622 courses, 82 certification issues, 2 certification issues, 1 HANS certification issues
Any Town Middle School	250	001 - MS	422 courses, 40 certification issues, 0 certification issues, 0 HANS certification issues
Central Preschool Center	215	Preschool - Preschool	2 courses, 20 certification issues, 0 certification issues, 0 HANS certification issues
South Town Elementary School	230	Primary - HS	197 courses, 60 certification issues, 0 certification issues, 0 HANS certification issues
Any Town Day Treatment Ctr	912	000 - 999	17 courses, 17 certification issues, 0 certification issues, 0 HANS certification issues

School	School Code	Grades	Comments
Any Town County	999	00	0 certification issues, 0 HANS certification issues
North Town Primary School	010	001 - Primary	36 courses, 76 certification issues, 0 certification issues, 0 HANS certification issues
Any Town High School	240	901 - HS	422 courses, 82 certification issues, 2 certification issues, 1 HANS certification issues
Any Town Middle School	250	001 - MS	422 courses, 40 certification issues, 0 certification issues, 0 HANS certification issues
Central Preschool Center	215	Preschool - Preschool	2 courses, 20 certification issues, 0 certification issues, 0 HANS certification issues
South Town Elementary School	230	Primary - HS	197 courses, 60 certification issues, 0 certification issues, 0 HANS certification issues
Any Town Day Treatment Ctr	912	000 - DT	17 courses, 17 certification issues, 0 certification issues, 0 HANS certification issues

Preliminary Audit Report School Information (page 4)

- Review the first page of each school for Staff warnings:
 - "No Courses" errors (ex. A)
 - "SSN not found in EPSB Database" (ex. B and C)
- Review each teacher's individual listing for any LEAD issues (will say "certification issue") (ex. D)
- If there are no errors, no list will appear.

Report Code: 002
Notes: 1st page: 1st page: 4 certification issues; 2nd page: 2 certification issues
Date Range: 01 - 01
413

Staff	First Name	Last Name	Position	SSN	Comments
10000001	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000002	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000003	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000004	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000005	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000006	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000007	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000008	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000009	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000010	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000011	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000012	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000013	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000014	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000015	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000016	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000017	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000018	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000019	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000020	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000021	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000022	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000023	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000024	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000025	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000026	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000027	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000028	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000029	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000030	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000031	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000032	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000033	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000034	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000035	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000036	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000037	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000038	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000039	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000040	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000041	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000042	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000043	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000044	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000045	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000046	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000047	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000048	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000049	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000050	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000051	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000052	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000053	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000054	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000055	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000056	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000057	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000058	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000059	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000060	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000061	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000062	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000063	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000064	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000065	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000066	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000067	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000068	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000069	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000070	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000071	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000072	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000073	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000074	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000075	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000076	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000077	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000078	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000079	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000080	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000081	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000082	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000083	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000084	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000085	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000086	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000087	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000088	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000089	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000090	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000091	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000092	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000093	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000094	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000095	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000096	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000097	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000098	JANE	SMITH	TEACHER	987654321	No courses for staffmember
10000099	JOHN	DOE	TEACHER	123456789	No courses for staffmember
10000100	JANE	SMITH	TEACHER	987654321	No courses for staffmember

Go to teacher's listing on next pages

Preliminary Audit Report – Staff Warnings


- No Courses for Staffmember
 - Check the schedule to make sure the individual has been assigned to one or more courses
 - If so, make sure the course is active and in a period within the instructional minutes
 - If the individual is a collaborating special ed teacher, they must be assigned as an additional teacher on one or more instructional courses

Preliminary Audit Report – Staff Warnings

- No Courses for Staffmember (cont.)
 - If the individual is a teacher but does not have their own group of students (i.e. Gifted or Reading Recovery) you have 2 options
 - Assign them a course in the schedule; a population will be needed in the population dropdown
 - Assign them as a collaborating teacher in the courses from which they pull students
 - Do not change the employee type to Support or Other
 - Check SSN, District Assignment, and District Employment tabs for valid entries.
 - This is an acceptable error if the individual's assignment at that location ended after the start date on the extract
 - Please note – do NOT leave this error; a support ticket to Infinite Campus may be required if no obvious error is found.

Preliminary Audit Report – Staff Warnings


- **SSN not found in EPSB Database**
 - Check the SSN listed on the report against SSN/payroll documentation on file in the district
 - If not accurate, correct on either the Demographics or Identities tab
 - If accurate, check the EPSB website (use KECI) to see if a record exists for that individual
 - If the individual is a support person, the error still must be resolved as it indicates that they have been assigned as primary or secondary teacher to one or more courses;
 - If the SSN is not on file at EPSB, contact Cindy Godsey



-
-
-
-
-
-

IMPORTANT INFORMATION!

- Staff members showing as non-certification errors on the first page of a school report cannot be checked for certification errors!
- These staff warnings **must** be corrected first for your LEAD data to be accurate



FLDOE
Florida Department of Education
Ensuring a bright future for every child

-
-
-
-
-
-

Preliminary Assignment Report

- This page shows certification information, MUNIS data, and assignment warnings for those with errors. Only the courses with errors will show. (examples on p. 5 & 7)
- Check MUNIS related errors – make sure the person has the correct job class code.
- Check the error message, which will assist you in resolving certification and coding issues. – see page 2 of your report for a detailed list of errors

The screenshot displays a 'Preliminary Assignment Report' with the following sections:

Header Information:

- Name: Warner, Dallas Charles
- SSN: 12128912
- EMPLID: 21110550
- SCHOOL: Any Town County
- STATUS: Any Town High School

Course Details:

Course	Course Description	Course Status	Course Dates	Course Type
7503	Preliminary Provisional Certificate For Social Studies, 9-12	Active	08/14/2022	08/14/2022
7503	Preliminary Provisional Certificate For Social Studies, 9-12	Active	08/14/2022	08/14/2022
7503	Preliminary Provisional Certificate For Social Studies, 9-12	Active	08/14/2022	08/14/2022

Assignment Details:

Assignment	Assignment Description	Assignment Status	Assignment Dates	Assignment Type
7503	Preliminary Provisional Certificate For Social Studies, 9-12	Active	08/14/2022	08/14/2022
7503	Preliminary Provisional Certificate For Social Studies, 9-12	Active	08/14/2022	08/14/2022
7503	Preliminary Provisional Certificate For Social Studies, 9-12	Active	08/14/2022	08/14/2022

Employee Information:

Employee	Employee Description	Employee Status	Employee Dates	Employee Type
7503	Preliminary Provisional Certificate For Social Studies, 9-12	Active	08/14/2022	08/14/2022
7503	Preliminary Provisional Certificate For Social Studies, 9-12	Active	08/14/2022	08/14/2022
7503	Preliminary Provisional Certificate For Social Studies, 9-12	Active	08/14/2022	08/14/2022

Assignment Warnings:

Assignment	Assignment Description	Assignment Status	Assignment Dates	Assignment Type
7503	Preliminary Provisional Certificate For Social Studies, 9-12	Active	08/14/2022	08/14/2022
7503	Preliminary Provisional Certificate For Social Studies, 9-12	Active	08/14/2022	08/14/2022
7503	Preliminary Provisional Certificate For Social Studies, 9-12	Active	08/14/2022	08/14/2022

Assignment Details:

Assignment	Assignment Description	Assignment Status	Assignment Dates	Assignment Type
7503	Preliminary Provisional Certificate For Social Studies, 9-12	Active	08/14/2022	08/14/2022
7503	Preliminary Provisional Certificate For Social Studies, 9-12	Active	08/14/2022	08/14/2022
7503	Preliminary Provisional Certificate For Social Studies, 9-12	Active	08/14/2022	08/14/2022

Assignment Warnings:

Assignment	Assignment Description	Assignment Status	Assignment Dates	Assignment Type
7503	Preliminary Provisional Certificate For Social Studies, 9-12	Active	08/14/2022	08/14/2022
7503	Preliminary Provisional Certificate For Social Studies, 9-12	Active	08/14/2022	08/14/2022
7503	Preliminary Provisional Certificate For Social Studies, 9-12	Active	08/14/2022	08/14/2022

Assignment Details:

Assignment	Assignment Description	Assignment Status	Assignment Dates	Assignment Type
7503	Preliminary Provisional Certificate For Social Studies, 9-12	Active	08/14/2022	08/14/2022
7503	Preliminary Provisional Certificate For Social Studies, 9-12	Active	08/14/2022	08/14/2022
7503	Preliminary Provisional Certificate For Social Studies, 9-12	Active	08/14/2022	08/14/2022

Assignment Warnings:

Assignment	Assignment Description	Assignment Status	Assignment Dates	Assignment Type
7503	Preliminary Provisional Certificate For Social Studies, 9-12	Active	08/14/2022	08/14/2022
7503	Preliminary Provisional Certificate For Social Studies, 9-12	Active	08/14/2022	08/14/2022
7503	Preliminary Provisional Certificate For Social Studies, 9-12	Active	08/14/2022	08/14/2022

Assignment Details:

Assignment	Assignment Description	Assignment Status	Assignment Dates	Assignment Type
7503	Preliminary Provisional Certificate For Social Studies, 9-12	Active	08/14/2022	08/14/2022
7503	Preliminary Provisional Certificate For Social Studies, 9-12	Active	08/14/2022	08/14/2022
7503	Preliminary Provisional Certificate For Social Studies, 9-12	Active	08/14/2022	08/14/2022

Assignment Warnings:

Assignment	Assignment Description	Assignment Status	Assignment Dates	Assignment Type
7503	Preliminary Provisional Certificate For Social Studies, 9-12	Active	08/14/2022	08/14/2022
7503	Preliminary Provisional Certificate For Social Studies, 9-12	Active	08/14/2022	08/14/2022
7503	Preliminary Provisional Certificate For Social Studies, 9-12	Active	08/14/2022	08/14/2022

Assignment Details:

Assignment	Assignment Description	Assignment Status	Assignment Dates	Assignment Type
7503	Preliminary Provisional Certificate For Social Studies, 9-12	Active	08/14/2022	08/14/2022
7503	Preliminary Provisional Certificate For Social Studies, 9-12	Active	08/14/2022	08/14/2022
7503	Preliminary Provisional Certificate For Social Studies, 9-12	Active	08/14/2022	08/14/2022

Assignment Warnings:

Assignment	Assignment Description	Assignment Status	Assignment Dates	Assignment Type
7503	Preliminary Provisional Certificate For Social Studies, 9-12	Active	08/14/2022	08/14/2022
7503	Preliminary Provisional Certificate For Social Studies, 9-12	Active	08/14/2022	08/14/2022
7503	Preliminary Provisional Certificate For Social Studies, 9-12	Active	08/14/2022	08/14/2022

Assignment Details:

Assignment	Assignment Description	Assignment Status	Assignment Dates	Assignment Type
7503	Preliminary Provisional Certificate For Social Studies, 9-12	Active	08/14/2	

-
-
-
-
-
-

[illegible]

Preliminary Audit Report comments

- **Certification Issue**
 - There is an error with one or more of this individual's courses or with their MUNIS jobclass code. This comment is not always indicative of a problem with the individual's certificate; is usually indicates a miscode of some kind.
- **Holds only SOE/Must Submit COE**
 - The only valid credential held by the teacher is a Statement of Eligibility. If the teacher is new, please file the Confirmation of Employment with the KTIP office. If the teacher has completed KTIP, their current certification has expired and additional steps need to be taken.



Preliminary Audit Report comments

- **KTIP Approved**
 - This comment can indicate 2 different things:
 - 1. The individual has recently completed KTIP but the final report has not yet been submitted by the District KTIP coordinator
 - 2. The individual has been approved to enter KTIP but the internship certificate has not yet been processed
- **KTIP Final**
 - The individual has recently completed KTIP and a final report has been received. Processing is not complete due to one or more missing items (usually \$\$)



Preliminary Audit Report comments

- **Specify Content**
 - The content is currently displaying "none."
 - Assign a state course code on the course tab
 - If the state code of 909999 has been assigned on the course tab, you will need to assign a content for each section on the section tab
 - Do not assign a content on the section tab otherwise
 - Any content listed on the section tab will be ignored unless the state code is 909999 or one of a few specific elementary course codes



Preliminary Audit Report comments

- Specify Population
 - If the population is displaying on the LEAD report as “None”, there are no active students in the course.
 - This will also cause the grade range to default to the range of the school
 - Assign students to the course or assign a population on the section tab
 - If the course was used at some point during the term, but all students have withdrawn, you must assign a population – it cannot be left as “none”



Preliminary Audit Report comments

- Out of Field
 - The content for the course does not match the certification of the teacher
 - Check the state course code to make sure it is appropriate for the course
 - Check the section tab to remove an incorrect content



Preliminary Audit Report comments

- Out of Population
 - One or more of the populations of the students does not match the certification of the teacher
 - Remember – populations are assigned based on the students on the roster in the class and cannot be changed
 - An FMD student mainstreamed into the classroom of a general ed teacher **requires** a collaborating FMD certified teacher
 - Check the roster of students for active special ed flags and locked IEPs if the population is “General” in a special ed class.
 - A student cannot have overlapping IEPs – use IC Caseload Summary Report to find
 - Change the Special Type if needed



Preliminary Audit Report comments

- Out of Grade Range
 - The grade range comes from the students enrolled in the section
 - If there are no students in the course, the grade range defaults to the range of the school
 - There is no way to edit the grade range in Infinite Campus.
 - If it has defaulted to the grade range of the school and this isn't accurate (e.g. an elementary math coach in a PS-6 school only working with K-3 students) LEAD coordinators can edit the grade range on the LEAD website



Preliminary Audit Report comments

- Incorrectly Coded (This error comment will only appear on the Edit LEAD Data Page).
 - The content or the population is currently displaying "none." Supply the needed information to correct
- Insufficient Certification (course)
 - The teacher's certification does not match one or more parameters of the course, but the LEAD system is unable to identify the specific problem
- Insufficient Certification (MUNIS)
 - The teacher/administrator cannot clear this particular jobclass with their current certification



Help



Where to find information

- The web address to access the LEAD web application is <https://wd.kyepsb.net/EPsb.WebApps/LEAD/>
- This presentation and additional resources can be found at <http://www.epsb.ky.gov/certification/LEAD.asp>
 - Additional resources available
 - Content Tree
 - Populations list
 - MUNIS Certification Reference Chart
 - Links to the LEAD application and KECI
 - LEAD Data Change Tracking Form
- For information regarding Highly Qualified issues, refer to the EPSB HQ Guidance Documents at <http://www.epsb.ky.gov/nclb.asp>



Contact information - EPSB

- LEAD support/guidance
 - contact the LEAD Help Desk
 - 1-888-598-7667 or EPsbLEADTEAM@ky.gov
- EPSB login, user id, and password
 - contact EPSB help desk
 - 1-888-598-7667 or EPsbHELP@ky.gov
- Certification Questions
 - contact the Division of Certification
 - 1-888-598-7667
- HQ Questions
 - contact the HQ team
 - 1-888-598-7667 or EPsbHQ@ky.gov



Questions?